

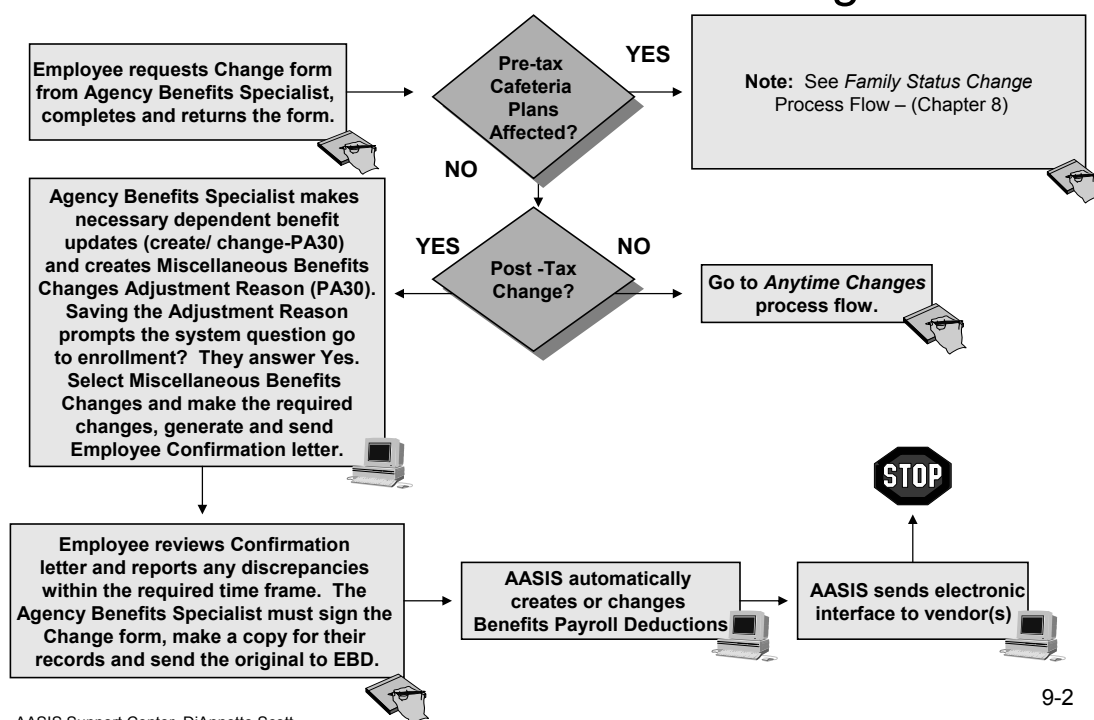


HRBEN BENEFITS ADMINISTRATION

Chapter 9 – Miscellaneous Changes



Miscellaneous Benefits Changes



AASIS Support Center, DiAnnette Scott
July '04, Revised to V5.0

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Miscellaneous Benefits Changes require an Adjustment Reason (PA30).

Miscellaneous Benefits Changes are made for the following reasons:

- Employee request their Post-tax Optional Life coverage be cancelled if the entire amount is post-tax
- Employee request their Dependent Life coverage be cancelled
- Employee request their Post-tax Health Plan be cancelled
- Employee request their dependent's Post-tax Health Plan be cancelled and the deduction is affected

The date that Supplemental Life Insurance (Optional Life) and AD&D (Accidental Death and Dismemberment) amounts will increase due to an increase in salary (such as promotion, COLA, etc.) is effective September 1. Also, if the employee has a decrease in their salary (such as a demotion) the Supplemental Life Insurance and AD&D amounts will decrease September 1.

Effective March 2003, employees can only apply for or change their Supplemental Life Insurance (Optional Life) during open enrollment unless they experience a Family Status Change.



Exercise

Scenario #10

- An Employee turns in a Change Form to request that their Dependent Life Plan be cancelled. Process the Employee's change request.





Demonstration

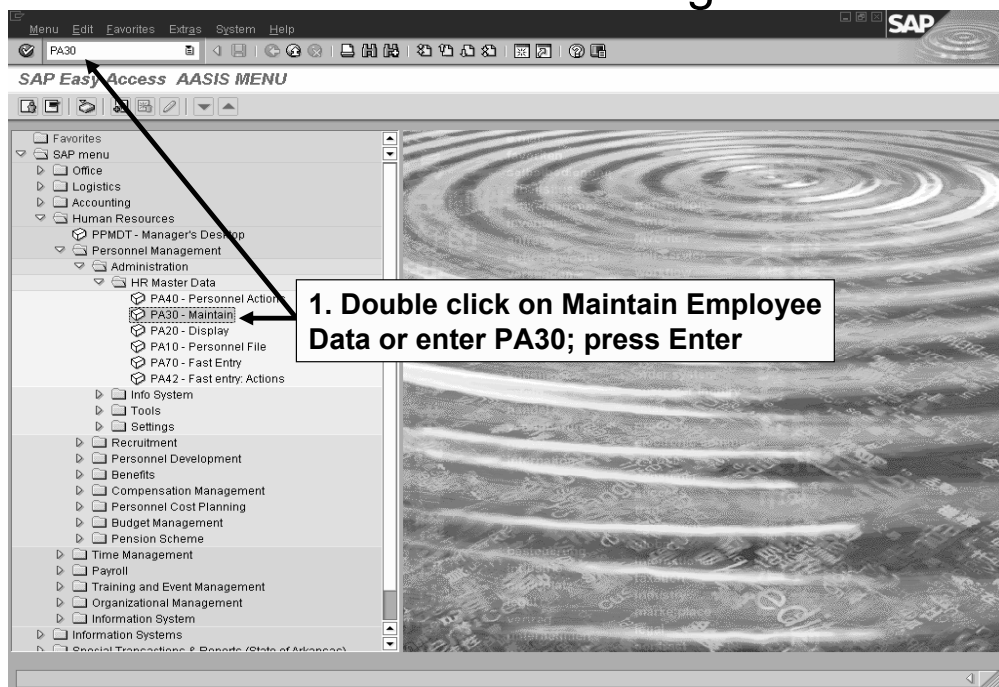
- Cancel Employee's Dependent Life Benefit Plan

Human Resources > Personnel Management >
Administration > Benefits > Enrollment
(PA30/HRBEN0001)





Miscellaneous Changes



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Miscellaneous Changes

HR master data Edit Goto Extras Utilities Settings System Help

Maintain HR Master Data

Personnel no. 55 **2. Enter personnel number**

Name Gail Hadley

EE group 1 Regular State Pers.area FA04 DFA

EE subgroup UE Employee Cost Center 383230 ZOO

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Infotype text E

General Benefits Information ✓

Family Member/Dependents ✓

Adjustment Reasons ✓

Health Plans ✓

Insurance Plans ✓

Savings Plans ✓

Flexible Spending Accounts

Benefits Medical Information

COBRA-Qualified Beneficiary

Period

Fr. To

☐ Today ☐ Curr.week

☐ A11 ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current Year

Choose

Direct selection

Infotype STy

3. Scroll to select the Benefits tab



Miscellaneous Changes

HR master data Edit Goto Extras Utilities Settings System Help

SAP

Main

5. Click Create

Personnel no. 55
Name 6a11 Hadley
EE group 1 Regular State Pers.area FA04 DFA
EE subgroup UE Employee Cost.Center 383230 ZOO

Personal Data Addtl. Employee Data Employment Issues Career Manage...

Infotype text E
General Benefits Information
Family Member/Dependents
Adjustment Reasons
Health Plans
Insurance Plans
Savings Plans
Flexible Spending Accounts
Benefits Medical Information
COBRA-Qualified Beneficiary

Period
Period
Fr. To
Today Curr.week
All Current month
From curr.date Last week
To current date Last month
Curr.period Current Year
Choose

Direct selection
Infotype 0378 STy

4. Select the Adjustment Reasons or enter 0378 in the Infotype field



Miscellaneous Changes

Infotype **8. Click to Enter**

Create Adjustment Reasons

Personnel No 55 Name Ga11 Ha... Status Active

EE group 1 Regular State Em... Personnel s... SSN

EE subgroup UE Employee

Start 07/07/2004 **6. Enter the change date of Coverage in the 'Start' field**

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason ☒ Family Status Change

HIPAA

New Hire Enrollment

Transfer(Rtr. Plans)

Transfer (All Plans)

Return from LWOP

7. Select 'Misc. Benefit Changes'

Promotion/Demotion

Rehire

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Miscellaneous Changes

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 55 Name 6a11 Ha... Status Active
EE group 1 Regular State Em... Personnel ar FA04 DFA
EE subgroup UE Employee SSN 112-66-0815
Start 07/07/2004 to 12/31/9999

Adjustment Reason Data
Benefit area State of Arkansas-US
Adjustment reason Misc Benefit Changes

Deviation from end date
Current end date: 12/31/9999
Calculated end date: 08/06/2004
Do you want to replace the current end date with the calculated end date?

9. Click Yes



Miscellaneous Changes

Infotype Edit Goto Extras System Help

✓ [Icons] SAP

Create Adjustment Reasons

10. Click to Save

Personnel No. [] Status Active

EE group 1 Regular State Em. Personnel ar FA04 DFA

EE subgroup UE Employee SSN 112-66-0815

Start 07/07/2004 to 08/06/2004

Adjustment Reason Data

Benefit area State of Arkansas-US

Adjustment reason Misc Benefit Changes

Save your entries

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Miscellaneous Changes

Infotype Edit Goto Extras System Help

Create Adjustment Reasons

Personnel No 55 Name 6a11 Ha... Status Active
EE group 1 Regular State Em... Personnel ar FA04 DFA
EE subgroup UE Employee SSN 112-66-0815
Start 07/07/2004 to 08/06/2004

Adjustment Reason Data
Benefit area State of Arkansas-US
Adjustment reason Misc Benefit Changes

Go to enrollment

Do you want to go to enrollment?

Yes No Cancel

11. Click Yes



Miscellaneous Changes

Enrollment Edit Qoto System Help

Enrollment

Direct selection Selection set

Personnel no.

ID number

Select

Enroll

Name Gail Hadley on 07/07/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Misc Benefit Changes	07/07/2004 - 08/06/2004
Retiree	06/30/2004 - 07/30/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

12. Double click on Misc Benefit Changes

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Miscellaneous Changes

Enrollment Edit Qoto System Help

Enrollment

Direct selection Selection set

Personnel no. []

ID number []

Select

Pers.No. Name

55 Gail Hadley

Enroll

Name Gail Hadley on 07/07/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Misc Benefit Changes	07/07/2004 - 08/06/2004
Rehire	06/30/2004 - 07/30/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Misc Benefit Changes

Enroll Costs Undo selection Error list

Status	Validity period	Activity
Medical		
Health Advantage HMO	07/07/2004 - 12/31/9999	
QualChoice HMO	07/07/2004 - 12/31/9999	
Health Advantage POS	07/07/2004 - 12/31/9999	
QualChoice POS	07/07/2004 - 12/31/9999	
Blue Cross Blue Shield PPO		
Basic Life		
US Able (Basic EE Life ASE)		
Dependent Life		
US Able (Basic DEP Life ASE)		
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	07/07/2004 - 12/31/9999	
Optional Life		
US Able-Opt EE Life ASE 1x2X	07/07/2004 - 12/31/9999	
Opt. Life Post		
US Able Opt EE 1x2x Post Tax	07/07/2004 - 12/31/9999	

13. Double click on the Plan to be terminated



Miscellaneous Changes

Enrollment Edit Quto System Help

Enrollment

14. Click in the box to cancel coverage

Plan US Able (Basic DEP Life ASE)
Start 07/07/2004 - 12/31/9999

☒ Stop participation in period

Coverage

Insurance option and coverage

Insurance Optio	Dep Life Children \$2K/\$10K
Basic Coverage	4,000.00 USD
Additional Unit	0 X 0.00 USD
Insurance Cover	4,000.00 USD

Costs USD Monthly

EE post-tax	2.16
Employer	0.00

Accept X

15. Click to Accept

Print form Error list

Enrollment period
07/07/2004 - 08/06/2004
06/30/2004 - 07/30/2004
01/01/1800 - 12/31/9999

Undo selection Error list

Status	Validity period	Activity
MO	07/07/2004 - 12/31/9999	
OS	07/07/2004 - 12/31/9999	
ield PPO	07/07/2004 - 12/31/9999	
Life ASE)	07/07/2004 - 12/31/9999	
Life ASE)	07/07/2004 - 12/31/9999	
Life ASE)	07/07/2004 - 12/31/9999	
Optional Life		
US Able-Opt EE Life ASE 1x/2X	07/07/2004 - 12/31/9999	
Opt. Life Post		
US Able Opt EE 1x/2x Post Tax	07/07/2004 - 12/31/9999	

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Miscellaneous Changes

Enrollment Edit Qoto System Help

Enrollment

Direct selection Selection set

Personnel no. []

ID number []

Select

Pers.No. Name

55 Gail Hadley

Enroll

Name Gail Hadley on 07/07/2004 Overview

Offer selection

Get offer Print form Error list

Possible offers	Enrollment period
Misc Benefit Changes	07/07/2004 - 08/06/2004
Rehire	06/30/2004 - 07/30/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Misc Benefit Changes

Enroll Costs Undo selection Error list

	Status	Validity period	Activity
Medical			
Health Advantage HMO			
QualChoice HMO			
Health Advantage POS			
QualChoice POS			
Blue Cross Blue Shield PPO			
Basic Life			
US Able (Basic EE Life ASE)		07/07/2004 - 12/31/9999	
Dependent Life			
US Able (Basic DEP Life ASE)		07/07/2004 - 12/31/9999	Stop
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		07/07/2004 - 12/31/9999	
Optional Life			
US Able-Opt EE Life ASE 1x/2X		07/07/2004 - 12/31/9999	
Opt. Life Post			
US Able Opt EE 1x/2x Post Tax		07/07/2004 - 12/31/9999	

16. Click Enroll

Note: A 'Stop' sign will appear for the plan(s) to be cancelled

Miscellaneous Changes

Note: Verify that you have selected the correct plan to be cancelled.

17. Click Enroll

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Miscellaneous Changes

Enrollment

Direct selection Selection set

Enroll

Name Sa11 Hadley on 07/07/2004 Overview

Personnel no.

Offer selection

Print form Error list

Enrollment period

07/07/2004 - 08/08/2004
06/30/2004 - 07/30/2004
01/01/1800 - 12/31/9999

Enrollment completed successfully

Continue Confirmation

18. Click Confirmation; Follow print instructions

	Status	Validity period	Activity
Health Advantage HMO	●	07/07/2004 - 12/31/9999	
QualChoice HMO	●	07/07/2004 - 12/31/9999	
Health Advantage POS	●	07/07/2004 - 12/31/9999	
QualChoice POS	●	07/07/2004 - 12/31/9999	
Cross Blue Shield PPO	●	07/07/2004 - 12/31/9999	
Health Advantage (Basic EE Life ASE)	●	07/07/2004 - 12/31/9999	
QualChoice (Basic EE Life ASE)	●	07/07/2004 - 12/31/9999	
Health Advantage (Basic DEP Life ASE)	●	07/07/2004 - 12/31/9999	ITP
Opt. Dep. Life			
US Able (Opt DEP Life ASE)		07/07/2004 - 12/31/9999	
Optional Life			
US Able-Opt EE Life ASE 1X2X	●	07/07/2004 - 12/31/9999	
Opt. Life Post			
US Able Opt EE 1x2x Post Tax	▲	07/07/2004 - 12/31/9999	

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Miscellaneous Changes

Enrollment Edit Qoto System Help

Enrollment

Direct selection Selection set

Enroll Name Ga11 Hadley on 07/07/2004 Overview

Personnel no.

ID Enrollment

Enrollment completed successfully

Continue Confirmation

19. Click Continue

Print form Error list

Enrollment period
07/07/2004 - 08/06/2004
06/30/2004 - 07/30/2004
01/01/1800 - 12/31/9999

Costs Undo selection Error list

Status	Validity period	Activity
Health Advantage HMO	07/07/2004 - 12/31/9999	
QualChoice HMO	07/07/2004 - 12/31/9999	
Health Advantage POS	07/07/2004 - 12/31/9999	
QualChoice POS	07/07/2004 - 12/31/9999	
Blue Cross Blue Shield PPO	07/07/2004 - 12/31/9999	
Basic Life		
US Able (Basic EE Life ASE)	07/07/2004 - 12/31/9999	
Dependent Life		
US Able (Basic DEP Life ASE)	07/07/2004 - 12/31/9999	
Opt. Dep. Life		
US Able (Opt DEP Life ASE)	07/07/2004 - 12/31/9999	
Optional Life		
US Able-Opt EE Life ASE 1X/2X	07/07/2004 - 12/31/9999	
Opt. Life Post		
US Able Opt EE 1x/2x Post Tax	07/07/2004 - 12/31/9999	

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Miscellaneous Changes

Enrollment

20. Click to Exit

Name: Gail Hadley on 07/07/2004 Overview

Possible offers	Enrollment period
Misc Benefit Changes	07/07/2004 - 08/06/2004
Rehire	06/30/2004 - 07/30/2004
Anytime changes	01/01/1800 - 12/31/9999
Automatic offer	

Offer

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Questions and Answers

